

The State Bar of California

REQUEST FOR PROPOSAL



This document is a Request for Proposal (“RFP”) for Security Services.

The State Bar of California is seeking proposals for uniformed, unarmed security guard services for its San Francisco building and Los Angeles offices for a period of three (3) years, with two options to renew for additional one (1) year terms each.

Minimum Requirements: Vendors must be party to both the 12/1/2007 collective bargaining agreement with the Service Employees International Union, local 24/7 (San Francisco), and the 3/1/2008 collective bargaining agreement with the Service Employees International Union, local 2006 (Los Angeles). Vendors must currently service a minimum of ten active accounts in multi-story office buildings in both the San Francisco Bay Area and Los Angeles County. **Vendors which do not meet these minimum requirements are not eligible to bid.**

The State Bar of California will host a vendor pre-bid meeting and facilities walk-through in each city to discuss this request in greater detail. **Attendance at at least one session is mandatory for all vendors intending to submit a proposal** (attendance at both is optional). The Los Angeles meeting will be held at 10:30 a.m. on Tuesday, October 19, 2010, at 1149 South Hill Street (4th floor), Los Angeles. The San Francisco meeting will be held at 10:30 a.m. on Thursday, October 21, 2010, at 180 Howard Street (4th floor), San Francisco.

Please submit five (5) copies of your proposal no later than 4 p.m. on November 2, 2010 to:

The State Bar of California
180 Howard Street
San Francisco, CA 94105-1639

Attn: Steve Mazer
Director of Operations
415-538-2326
steve.mazer@calbar.ca.gov

I. INTRODUCTION

The State Bar of California (“the State Bar”), created in 1927 by the Legislature and adopted into the California Constitution in 1960, is a public corporation within the judicial branch of state government. The primary purpose of the State Bar is to serve as an administrative adjunct to the California Supreme Court in all matters pertaining to the admission, discipline, and regulation of California lawyers. The State Bar Act and California court rules vest in the State Bar the duty to regulate the legal profession, formulate and elevate educational and professional standards, raise the quality of legal services, advance the science of jurisprudence, and aid in the improvement of the administration of justice.

The State Bar is a unified, or integrated bar, and membership is mandatory for all attorneys who are licensed to practice law in the state. In addition to its mandated licensing and disciplinary and certification functions, the State Bar offers a number of other programs designed to assist, educate and protect its members and the public. The State Bar’s programs are financed primarily by fees paid by attorneys and applicants to practice law. At the end of 2009, the State Bar had approximately 226,400 members, making it the largest unified state bar in the country. More information about the organization can be found at: <http://www.calbar.ca.gov/AboutUs.aspx>.

II. STATEMENT OF WORK

A. Background: State Bar Facilities

San Francisco: The State Bar owns, manages and is the majority occupant of 180 Howard Street, a 13-story, 220,000 square foot (gross measured area) office building in the financial district. The State Bar occupies seven office floors; two office floors are occupied by tenants of various sizes; three office floors are currently vacant but will eventually be occupied by tenants. The ground floor houses several small retail tenants, the security desk, and the State Bar’s reception, mailroom and copy center. Approximately 280 State Bar employees and 120 tenants work in 180 Howard Street. On average the building receives approximately 150 visitors per day, and also hosts large meetings several times a month. The vendor will provide security for the entire building.

Los Angeles: The State Bar is a tenant in 1149 South Hill Street in the Southpark district of downtown. 1149 South Hill Street and the connected 1150 South Olive Street comprise a complex known as the AT&T Center, which is owned and managed by LBA Realty. The State Bar occupies approximately 144,000 rentable square feet, on six floors. Approximately 280 State Bar employees work in the Los Angeles office. On average the office receives approximately 75 visitors per day, and also hosts large meetings several times a month. The State Bar also owns a 117,000 square foot surface parking lot one block away from 1149 South Hill Street, on the block bounded by Grand Avenue, 12th Street, Olive Street and Pico Blvd. The vendor will provide security for the Bar’s offices on six floors, and for the parking lot.

All provisions of this Request for Proposal apply to both cities unless specifically noted otherwise.

B. Positions Defined

Because vendors likely use different terms to describe various positions, the positions described in this RFP are defined as follows:

1. Regular Guard: A regular, non-exempt security guard performing standard duties.
2. Supervising Guard: A non-exempt security guard with additional responsibility for the on-site supervision of the regular guards.
3. Account Manager: An exempt, on-site manager.
4. Account Executive: The vendor's senior management representative, responsible for the account with State Bar and serving as the State Bar's contact for all matters related to services provided under the contract.

C. Services Provided

Vendor shall provide all the standard security services normally associated with protecting people and property in high-rise office buildings. Services shall include, but may not be limited to, the following:

1. Implement/enforce access control policies/procedures; greet, check-in, screen, direct and escort employees, tenants, visitors and vendors.
2. Recognize and respond to security threats or breaches.
3. Recognize and respond to emergency situations and safety hazards such as fire alarms, power outages, medical emergencies and elevator entrapments.
4. Maintain, test and operate security equipment such as x-ray machines, metal detectors, panic alarms, access card readers and radios.
5. Monitor access/alarm systems, surveillance systems, life safety systems, etc.
6. Prepare/maintain appropriate logs and reports of activities, incidents, etc.
7. Implement/enforce security procedures as described in the Post Orders.
8. Make recommendations about changes to security policies and procedures, or about appropriate responses to specific issues, based on vendor's own expertise and accepted industry best practices.

9. Monitor and provide information about public events or other activities in the geographic area that may impact State Bar operations

D. Post Orders

As approved by the State Bar, vendor shall provide and maintain Post Orders, a copy of which shall be maintained at each security post. The State Bar, at its sole discretion, may change and/or amend the Post Orders at any time to accommodate its needs and/or to improve the delivery of services. The Post Orders shall include but not be limited to:

1. The policies and detailed procedures related to providing security at the site
2. Daytime and after-hours contact information for key State Bar staff; for the vendor’s site supervisor, account manager and account executive; and for others as appropriate
3. Reference information, emergency contact information and any other resources required to allow the security team to effectively respond to emergency situations

E. Staffing Level and Schedule

Vendor shall provide a security team at the site according to the staffing plans below. The plans reflect the State Bar’s current, regular staffing level and schedule at each site. Staffing levels and/or schedules may be changed at any time, temporarily or permanently, at the discretion of the State Bar.

San Francisco

Position/ Post	Hours Week	Usual Schedule*
Account Manager	40	M-F 8:15 am - 5:15 pm
Supervising Guard	40	M-F 6:00 am - 3:00 pm
Regular Guard 1/lobby	40	M-F 10:00 am - 7:00 pm
Regular Guard 2/lobby	40	M-F 8:00 am - 5:00 pm
Regular Guard 3/court	40	M-F 8:30 am - 5:00 pm, 30 min unpaid lunch
Regular Guard 4/lobby	8	Sat 9:00 am – 5:00 pm, no break

*Schedule includes 1 hour unpaid lunch break, unless otherwise noted.

Los Angeles

Position/ Post	Hours Week	Usual Schedule*
Supervising Guard	40	M-F 8:15 am - 5:15 pm
Regular Guard 1/reception	40	M-F 6:00 am - 3:00 pm
Regular Guard 2/reception	40	M-F 10:30 am - 7:30 pm
Regular Guard 3/court	40	M-F 8:15 am - 5:15 pm

Regular Guard 4/court	40	M-F 8:15 am - 5:15 pm
Regular Guard 5/parking lot	40	M-F 6:00 am – 2:30 pm, 30 min unpaid lunch
Regular Guard 6/parking lot	40	M-F 2:00 pm – 10:30 pm, 30 min unpaid lunch
Regular Guard 7/parking log	16	Sat-Sun 8:00 am – 5:00 pm

*Schedule includes 1 hour unpaid lunch break, unless otherwise noted.

F. Staffing Considerations

The term “staff” as used below applies to regular guards, supervising guards and account managers, and their substitutes. The following provisions will apply:

1. Vendor acknowledges that the quality of services provided is, in part, dependent upon the vendor’s thorough understanding of the State Bar’s operations, employees and particular security issues. Vendor will work closely with the State Bar to select and schedule a stable team of security staff, making changes in personnel only when necessary.
2. The State Bar reserves the right to participate in the interview process and to approve or reject the assignment of vendor’s staff to its account. The State Bar further reserves the right to remove any staff member from its account, at any time and for any reason.
3. As approved in advance by the State Bar, vendor shall provide at least four (4) additional fully-trained substitute regular guards and one (1) additional fully-trained substitute supervising guard, who shall be available on short-notice (four hours or less) to substitute for the regularly scheduled staff as needed, and/or provide to supplemental or overtime services as requested. Vendor shall be responsible for any costs associated with training the substitute security staff. Rates billed for the substitute staff shall be at the State Bar’s contracted hourly billable rates.
4. If contracts are awarded to new vendors, the State Bar may wish to retain the services of individual regular guards, supervising guards and account managers who are employed by the State Bar’s current vendors, in order to benefit from those persons’ experience and familiarity with State Bar operations. As part of its proposal, vendor shall describe its willingness/ability, if awarded the contract as a new vendor, to hire persons currently employed by another vendor.

G. Staff Qualifications & Training

The terms “staff” as used below applies to regular guards, supervising guards and account managers, and their substitutes. The following provisions will apply:

1. As a condition of employment staff shall be screened according to the vendor’s hiring requirements, and at a minimum possess a valid guard card permit as

required by the State of California, and have passed background, reference, DMV and criminal record checks as conducted by the vendor.

2. Vendor shall ensure that staff has sufficient skills necessary to provide the required services consistent with the highest professional standards in the building security industry.
3. Vendor shall provide to all staff the minimum training as required by the California Bureau of Security and Investigative Services (BSIS).
4. In addition to the minimum training required by the BSIS, vendor shall provide to all staff, prior to assignment at the State Bar, training in the following areas:
 - a. Basic first aid and CPR
 - b. Customer service
 - c. How to deal with difficult people; de-escalation techniques
 - d. Basic report writing
 - e. Emergency Response
5. For all staff newly assigned to the State Bar, vendor shall provide, at no cost to the State Bar, a minimum of sixteen (16) hours of orientation and training on the State Bar's facilities, operations and security procedures.
6. For all regular guards assigned to the State Bar, vendor shall provide, at no additional cost to the State Bar, a minimum of three (3) hours per calendar quarter of supplemental training/continuing education. Training topics shall be agreed upon in advance by the State Bar and the vendor.
7. For all supervising guards and/or account managers assigned to the State Bar, vendor shall provide, at no additional cost to the State Bar, a minimum of eight (8) hours per calendar quarter of supplemental training/continuing education. Training topics shall be agreed upon in advance by the State Bar and the vendor.
8. The supervising guard and/or account manager shall maintain training records for all staff.
9. The State Bar reserves the right to require additional/specialized training for staff assigned to its account, to be provided by the State Bar at its expense.

H. Uniforms & Equipment

1. Vendor shall furnish and maintain uniform, professional attire for all staff. Such attire shall be subject to approval by the State Bar and include, at a minimum: Two (2) blazers; five (5) dress slacks; five (5) long-sleeve white or blue dress shirts; three (3) ties.
2. A supervising guard or an account manager will be permitted to wear his or her own business attire in lieu of the attire provided by the vendor.

3. Los Angeles Only: In addition to the attire described above, regular guards assigned to the parking lot will also be furnished with the following: five (5) short-sleeve white or blue dress shirts; five (5) casual slacks/khakis; five (5) shorts; bomber jacket; rain suit.
4. Los Angeles Only: Vendor shall provide and maintain, at its own expense, one (1) bicycle for use by guards assigned to the parking lot; vendor shall provide a bicycle helmet for each guard assigned to the parking lot.

I. Account Executive

1. Vendor shall assign, as an account executive, a senior management representative, responsible for the account with State Bar, and serving as the State Bar's contact for all matters related to services provided under the contract.
2. The account executive will hold monthly status meetings with the State Bar, at a mutually agreed upon time.
3. The account executive will ensure that the account manager and/or supervising guard receive sufficient oversight, support, guidance and resources from the vendor; will confer on a regular basis with the account manager and/or supervising guard; and will make regular scheduled and unscheduled visits to the site at least once per week. These visits will be documented and reported to the State Bar in a mutually acceptable format.
4. Vendor will provide a 24/7 telephone number through which the State Bar can contact the assigned or "on call" account executives in emergency situations.

III. GENERAL INFORMATION

The submission requirements for this RFP are set forth below. A proposal shall constitute an irrevocable offer for 60 business days following the deadline for its submission. Reference to a certain number of days in this RFP shall mean business days unless otherwise specified.

Contact with State Bar personnel in connection with this RFP may not be made other than as specified in this RFP. Unauthorized direct or indirect contact with any State Bar personnel may be cause for rejection of a bid.

A. Submission Requirements

To be considered responsive, a proposal must contain the following, referenced by number and in the order below. Proposals may include parts of the original RFP if answering questions asked or used in tailoring a specific response, but should not be included in full unaltered form for filler. If specific submission requirements are particularly large and self-contained (i.e., annual reports, 10-k,

users' guide, etc.) they may be included in a separate appendix. Proposals should not direct the evaluation team to visit online sources to obtain information, or include *to be provided after award*, or *provided upon request* clauses. Special instructions will be included for portions that must be submitted in their native format, usually .xls files (i.e., itemized cost forms, financial questionnaires, etc.).

1. A brief description of the history and organization of the bidder's firm and the organizational structure of the servicing/regional offices.
2. Copies of business licenses, union certifications, professional certifications or other credentials, together with evidence that bidder, if a corporation, is in good standing and qualified to conduct business in California.
3. The most recent year's annual reports, or comparable document, including detailed current profit and loss, assets and liabilities, and other relevant financial data. Bidders must submit Attachment B: Vendor History Questionnaire electronically in native .xls format to andrew.conover@calbar.ca.gov by the due date specified on page one.
4. Information regarding bidders' market position in the industry, strategic alliances, membership in professional associations, etc.
5. Qualifications, background and experience of the account executive and other staff proposed to work on the project.
6. References with contact information from a minimum of five current clients in San Francisco, and five in Los Angeles, that have used the bidder's services for the same type of facility and environment within the last 12 -18 months. Identify the nature of the clients' business; number of employees at the serviced site; approximate square footage, number of floors and other relevant information about the site; and the length of time the bidder has serviced the account.
7. A description of the techniques, approaches and methods to be used in providing the requested services.
8. Information regarding the orientation and training provided to security staff prior to assignment to a client's facility, as well as any ongoing training and development programs for security staff (both mandatory and voluntary).
9. Pursuant to II.F.4 above, a statement as to vendor's willingness/ability, if awarded the contract as a new vendor, to hire persons currently employed by the State Bar's current vendor.
10. A sample of the invoice used to bill clients for services.

11. A detailed cost proposal, including security personnel billing rates and all other expenses. Bidders must submit Attachment A: Itemized Cost Proposal electronically in native .xls format to andrew.conover@calbar.ca.gov by the due date specified on page one. As the State Bar may award a contract based on the initial offer, a bidder should make its initial offer on the most favorable terms available. The State Bar reserves the right, however, to have discussions with those bidders falling within a competitive range, and to request revised pricing offers from them and to make an award or conduct negotiations thereafter.
 - a. The cost proposal is based on current staffing. Actual staffing levels and schedules are subject to modification throughout contract term.
 - b. Hourly pay rate minimums are dictated by existing collective bargaining agreements. The rates indicated in the cost proposal are examples of current guard seniority. If the State Bar chooses a new vendor but retains staff employed by its current vendors, those staff members will retain their current seniority and pay rate. If new guards are engaged rates will reset to the collective bargaining agreement minimum wage. Rates for 2013, 2014 and 2015 are placeholder rates for the purpose of the RFP, and will be adjusted based on collective bargaining agreements that will take effect in 2013. Rates for supervising guards and account managers, for all years, are placeholder rates for the purpose of the RFP, and will be adjusted based on the classification and experience level of the specific individuals chosen for these positions.
 - c. Calculated management fees and other special operational fees are fixed for contract award term.
12. A written acknowledgement of the acceptance of the Contracting Requirements set forth in section IV of this RFP. Specific terms may be reserved for future negotiation, but must be clearly identified and reasons given for the reservation.

Proposals which fail to address each of the submission requirements above may be deemed non-responsive and will not be further considered. Note that responses to questions must be specifically answered within the context of the submitted proposal. The State Bar's evaluation team will not refer to a designated web site, brochure, or other location for the requested information. Responses that utilize references to external materials as an answer will be considered non-responsive.

B. Rejection of Proposals

The State Bar reserves the right in its sole discretion to reject any or all proposals in whole or in part, without incurring any cost or liability whatsoever. All proposals will be reviewed for completeness of the submission requirements. If a proposal fails to meet a material requirement of the RFP, or if it is incomplete or contains irregularities, the proposal may be rejected. A deviation is material to the extent that a proposal is not in substantial accord with RFP requirements.

Immaterial deviations may cause a bid to be rejected. The State Bar may or may not waive an immaterial deviation or defect in a proposal. The State Bar's waiver of an immaterial deviation or defect will in no way modify the RFP or excuse a bidder from full compliance with the RFP requirements.

Any proposal may be rejected where it is determined to be not really competitive, or where the cost is not reasonable.

Proposals that contain false or misleading statements may be rejected if in the State Bar's opinion the information was intended to mislead the State Bar regarding a requirement of the RFP.

C. Evaluation Process and Highest Scored Bidder

An evaluation team will review, in detail, all proposals that are received to determine the Highest Scored Bidder ("HSB").

Following the initial review and screening of the written Proposals, using the selection criteria described below, several bidders may be invited to participate in the final selection process, which may include participation in an oral interview and/or submission of any additional information as requested by the State Bar.

The State Bar reserves the right to determine the suitability of proposals on the basis of a proposal's meeting administrative requirements, technical requirements, the review team's assessment of the quality and performance of the equipment and services proposed, and cost.

During the evaluation process, the State Bar may require a bidder's representative to answer questions with regard to the proposal and/or require certain bidders to make a formal presentation to the evaluation team and/or the State Bar Senior Executive Team. The State Bar may also have discussions with those bidders falling within a competitive range, and request revised pricing offers from such bidders and make an award and/or conduct negotiations thereafter.

This Request for Proposal does not commit the State Bar to awarding a Contract. Bidders shall bear all costs incurred in the preparation of the Proposal and participating in the Proposal evaluation process. The State Bar reserves the right to reject any and all Proposals, to accept the Proposal it considers most favorable in its sole discretion, and to waive minor irregularities. The State Bar further reserves the right to seek new Proposals when such procedure is considered by it to be in the best interest of the State Bar.

1. The following criteria will be used in reviewing and comparing the proposals and in determining the HSB. The weight to be assigned to each criterion appears following each item.
 - a. Responsiveness of the proposal to the submission requirements set forth in the RFP (10%).
 - b. Agreement with the State Bar's contracting requirements (10%).
 - c. The technical ability, capacity, and flexibility of the bidder to perform the contract in a timely manner and on budget, as verified by, e.g., the quality of any demonstration, client references, demonstrated success in projects with similar requirements and any other contracts with the State Bar (40%).
 - d. The financial viability of the bidder as evidenced by standard financial reports and submitted Vendor History Questionnaire (10%).
 - e. The total cost of the proposal solution. If the proposal contains itemized rates, per piece pricing, or commission-based pricing, the State Bar reserves the right to calculate total contracted cost by calculating rates using either previous known usage activity or future projected volume. Costs will be evaluated only if a proposal is determined to be otherwise qualified. Costs should be itemized by type to allow the State Bar to implement the solution over the term of the contract (30%).
2. If a large number of proposals are received, the State Bar reserves the right to review the proposals using a tiered evaluation system. All qualified proposals will be evaluated based on the Submission Requirements and Cost, with the top candidates advancing as finalists and receiving a full evaluation as outlined above.

D. Award and Execution of Contract

Subject to the State Bar's right to reject any or all proposals, the HSB will be awarded the contract. Notice will be posted at the State Bar's offices at 180 Howard Street, San Francisco, CA and written notice sent to bidders on or about November 23, 2010 of the Bar's intention to award the contract to the HSB. It is anticipated that final selection of the HSB will be made by November 30, 2010. The evaluation team will select a winning proposal subject to approval by the Board of Governors. Upon selection, the State Bar and the selected Vendor will enter into good faith negotiations on a contract containing, without limitation, the Statement of Work and Contracting Requirements sections below.

No contract or agreement, express or implied, shall exist or be binding on the State Bar before the execution of a written contract by both parties. If agreement on the terms of

such a contract cannot be reached after a period deemed reasonable by the State Bar in its sole discretion, the State Bar may enter into negotiations and sign a contract with any other bidder who submitted timely, responsive and responsible proposals to this RFP.

If, after the State Bar and the HSB agree to terms and execute a contract, that contract is terminated for any reason, the State Bar may, in its sole discretion, either enter into negotiations with the next highest scored bidder, or issue a new RFP and begin the proposal process anew.

Questions regarding the State Bar's award of any business on the basis of proposals submitted in response to the RFP, or on any other matter in connection with the selection process, should be addressed in writing to andrew.conover@calbar.ca.gov.

Where written notice is required in this RFP, the notice must be sent by U.S. mail and either facsimile or e-mail.

E. Errors in the RFP

If a bidder discovers any ambiguity, conflict, discrepancy, omission, or other error in the RFP, the bidder should immediately provide the State Bar with written notice of the problem and request that the RFP be clarified or modified. Without disclosing the source of the request, the State Bar may modify the document prior to the date fixed for submission of proposals by issuing an addendum to all potential bidders to whom the RFP was sent.

If prior to the date fixed for submissions, a bidder knows of or should have known of an error in the RFP but fails to notify the State Bar of the error, the bidder shall bid at its own risk, and if, awarded the contract, shall not be entitled to additional compensation or time by reason of the error or its later correction.

F. Questions Regarding the RFP

Questions regarding the RFP may be addressed in person at the vendor pre-bid meeting as described on Page 1 above. Questions after this conference may be addressed in writing to Steve Mazer at steve.mazer@calbar.ca.gov. All questions must be submitted no later than 5 days prior to the date for submission of proposals. Questions and answers regarding the RFP may be shared with all bidders known to be interested in submitting a proposal.

If a question relates to a proprietary aspect of its proposal and the question would expose proprietary information if disclosed to competitors, the bidder may submit the question in writing, conspicuously marking it as "CONFIDENTIAL." With the question, the bidder must submit a statement explaining why the question is sensitive. If the State Bar concurs that the disclosure of the question or answer would expose proprietary information, the question will be answered, and both the question and answer will be kept in confidence. If the State Bar does not concur regarding the proprietary nature of the question, the question will not be answered in this manner and the bidder will be notified.

A bidder who believes that one or more of the RFP's requirements is onerous or unfair, or unnecessarily precludes less costly or alternative solutions, may submit a written request that the RFP be changed. The request must set forth the recommended change and reason for proposing the change. The State Bar must receive any such request no later than 5 days before the deadline for submitting proposals.

G. Addenda

The State Bar may modify the RFP prior to the date fixed for submission by posting, mailing, emailing or faxing an addendum to the bidders known to be interested in submitting a proposal. If any bidder determines that an addendum unnecessarily restricts its ability to bid, it must notify the State Bar in writing no later than 5 days before the deadline for submitting proposals.

H. Withdrawal and Resubmission/Modification of Proposals

A proposal may be withdrawn at any time prior to the deadline for submitting proposals by notifying the State Bar in writing of its withdrawal. The notice must be signed by the bidder. The bidder may thereafter submit a new or modified proposal, provided that it is received at the State Bar no later than the deadline.

Modification offered in any other manner, oral or written, will not be considered. Proposals cannot be changed after the evaluation process begins.

I. Protest Procedure

A bidder may protest the award if it meets all the following conditions:

1. The bidder has submitted a proposal that it believes is or should have been the HSB, under the criteria set forth above;
2. The bidder believes that its proposal meets the State Bar's administrative and technical requirements, proposes services of proven quality and performance, and offers a competitive cost to the State Bar; and
3. The bidder believes that the State Bar has incorrectly selected another bidder.

A bidder qualified to protest should contact Andrew Conover, Finance Manager, (415) 538-2207, to attempt an informal resolution. If this contact is unable to resolve the protest to the bidder's satisfaction, the bidder must file a written protest within 5 days of the notice of intention to award the contract. The written protest must state the facts surrounding the issue and the reasons the bidder believes the award to be invalid. The protest must be sent by certified or registered mail or delivered personally to:

The State Bar of California
180 Howard Street
San Francisco, CA 94105-1639

Attention: Peggy Van Horn, Chief Financial Officer

Protests will be reviewed and decided by the State Bar's Award Protest Team within 30 days after the State Bar issues written acknowledgment of the protest. In the event that a protest is filed, the contract award will be postponed pending resolution of the protest.

J. News Releases

News releases pertaining to the award of a contract may not be made without the prior written approval of the State Bar.

K. Disposition of Materials

All materials submitted in response to an RFP will become the property of the State Bar of California and will be returned only at the State Bar's option and at the expense of the bidder. One copy of each proposal will be retained for the State Bar's official files and become a public record. Specific limited pages of a proposal, not including proposed cost and compensation, may be marked as proprietary and confidential. The entire proposal cannot be deemed confidential. The bidder's consent will be requested before release of such confidential pages to non-State Bar personnel. By submitting a proposal, a bidder agrees to these terms and waives any right to pursue a cause of action for damages incurred as a result of the release of any information contained in a proposal.

IV. CONTRACTING REQUIREMENTS

Upon selection of a vendor, the terms set forth in this RFP are to be embodied in a definitive agreement containing such additional covenants and other provisions as may be mutually acceptable.

The State Bar contemplates that, in addition to the terms described above in this RFP, final agreement between the State Bar and the selected vendor will include, without limitation, the following terms. Submission of a proposal shall constitute agreement to contract on these terms, except for any term specifically reserved in the proposal for future negotiation.

A. Time of Essence

Time is of the essence with respect to Vendor's performance of the services and equipment to be provided in the final agreement.

B. Warranties and Representations

Vendor warrants and represents that it possesses such expertise, experience and resources to perform the scope of services required in a diligent, timely and professional manner consistent with the standards of the industry. Vendor represents and warrants that none of its work performed under this Agreement will infringe on the rights of third parties. Vendor will supply at all times an adequate number of well-qualified personnel to perform the work. Vendor will provide a contact person available and authorized to remedy any non-conformity with this warranty. If any of Vendor's work is found to be infringing, Vendor will correct the work to be non-infringing at no charge to the State Bar.

C. Equipment, Tools, Supplies

The Vendor will supply all equipment, tools, supplies, offices, personnel, instrumentalities, transportation, support services and insurance required. The Vendor is not required to purchase, rent or hire any equipment, tools, supplies, offices, transportation, personnel, insurance or instrumentalities from the State Bar. The State Bar has no obligation whatsoever to provide any equipment, tools, supplies, offices, personnel, instrumentalities, transportation, support services or insurance required to perform services under this agreement.

D. Indemnity Obligations of Vendor

Vendor will indemnify and defend the State Bar (including its Board of Governors, officers, director, agents, employees and volunteers, as the same may be constituted from time to time) from all claims, demands, damages, debt, liability, obligations, cost, expense, lien, action or cause of action (including but not limited to actual damages, fines and attorneys' fees, whether or not litigation is actually commenced) arising out of: (i) the material breach by Vendor of any warranty, representation, term or condition made or agreed to by Vendor; (ii) all products and services prepared by or for Vendor hereunder and provided to State Bar; (iii) any claim or action for personal injury, death or otherwise involving alleged defects in Vendor's business or any of its products or services provided to State Bar; (iv) any breach by Vendor of any statutory or regulatory obligation; (v) the actual or alleged infringement by Vendor of any patent, copyright, trademark or other proprietary right of any person or entity; and/or (vi) any act or omission of Vendor, its employees, agents or subcontractors.

E. Insurance Obligations of Vendor

The Vendor will provide and keep in full force and effect during the term of this agreement, at the Vendor's own cost and expense, the following insurance policies for the joint benefit of the Vendor and the State Bar, with an insurer reasonably acceptable to the State Bar:

1. Commercial general liability insurance with a general aggregate limit (other than products/completed operations) of at least Two Million Dollars (\$2,000,000.00); at least One Million Dollars (\$1,000,000.00) personal and advertising injury limit; at least One Million Dollars (\$1,000,000.00)

premises and operations limit; at least One Million Dollars (\$1,000,000.00) each occurrence limit;

2. Workers' compensation coverage as required by law, together with employer liability coverage with limits of not less than One Million Dollars (\$1,000,000.00) per occurrence.
3. Comprehensive automobile liability insurance covering owned, leased, hired and non-owned vehicles with at least One Million Dollars (\$1,000,000.00) combined single limit.
4. Professional liability insurance with a general aggregate limit of Two Million Dollars (\$2,000,000) and an occurrence limit of two Million Dollars (\$2,000,000).

The Vendor will deliver to the State Bar offices at 180 Howard Street, San Francisco, CA 94105 Attn: Operations, true and correct copies of its insurance policies required above, and certificates of such insurance within seven (7) days of the execution of this agreement. Each such policy will name the State Bar as an additional insured and will state that the Vendor's policy shall be primary and that any insurance carried by the State Bar shall be noncontributing with respect thereto. Each such policy will provide for thirty (30) days prior written notice to the State Bar in the event of cancellation or reduction in coverage or amount. If the Vendor fails to secure and maintain insurance policies complying with the provisions of this agreement, the State Bar may purchase the appropriate insurance policies and the Vendor will pay upon demand the cost of it to the State Bar or the State Bar may terminate this agreement. Additionally, if the Vendor assigns any portion of the duties under this agreement, each subcontractor or assignee will purchase and maintain the same insurance coverage required hereunder.

The Vendor will immediately notify the State Bar if the Vendor's commercial general liability insurance contains restrictive endorsements other than those restrictive endorsements normally included in the State of California. If the Vendor's commercial general liability insurance contains such restrictive endorsements, the Vendor shall have five (5) business days to remove said restrictions. If the Vendor is unable to do so, the State Bar may terminate this agreement, and will be required to give the Vendor no more than two (2) days' notice of such termination, anything in this agreement to the contrary notwithstanding.

F. Termination

1. **At Will.** The agreement may be terminated by the State Bar, in its sole and complete discretion, upon thirty (30) days written notice to Vendor. In the event of termination pursuant to this section, the vendor's sole compensation will be for that portion of services performed or goods delivered up to the date of termination, together with reimbursable expenses, if any then due. Vendor will not be paid for any services, goods

or reimbursable expenses associated with any work or service not specifically authorized by the State Bar.

2. **Authorization of Funds.** If the term of this agreement extends into fiscal year(s) subsequent to that in which it is signed, it is understood that the continuation of this contract is subject to the authorization of sufficient funding for such purpose by the California State Legislature. If sufficient funds are not so authorized, the parties mutually agree that the contract may be terminated or amended as appropriate in response to the reduction in funding. If the agreement is terminated, Contractor agrees to take back any affected equipment, products, software, or hardware furnished under this contract, and relieve the State Bar of any further obligation, except for the State Bar's obligation to pay for services already performed pursuant to this agreement.
3. **Default by Vendor.** This agreement may be terminated by the State Bar upon fifteen (15) days written notice to the Vendor in the event the Vendor is in default under any of its provisions. In the event this agreement is terminated due to the default by the Vendor, the Vendor will not be entitled to receive any compensation for services performed or for any reimbursable expenses incurred, and the State Bar will have the right to have the services completed by other parties and the Vendor will reimburse the State Bar for the actual costs to complete the services in excess of the balance of the fee and reimbursable expenses, if any, provided for in this agreement. Any such act by the State Bar will not be deemed a waiver of any other right or remedy of the State Bar, including, without limitation, the State Bar's right to consequential damages caused directly or indirectly by the Vendor's default.
4. **Automatic Termination.** This agreement will automatically terminate on the occurrence of any of the following events: (a) bankruptcy or insolvency of either party; (b) sale of the business of either party; (c) failure to comply with federal, state or local laws, regulations or requirements, or (d) expiration of the agreement.

G. Confidentiality and Publicity

The Vendor will retain all information provided by the State Bar in the strictest confidence and will neither use it nor disclose it to anyone other than employees requiring the information to perform services under this agreement without the prior written consent of the State Bar. The State Bar retains the right to enjoin any unauthorized disclosure in an appropriate court of law. The Vendor will not issue any public announcements concerning the State Bar without the prior written consent of the State Bar.

H. Compliance with Laws

The Vendor agrees to comply with all applicable federal, state, and local laws and regulations, including but not limited to the provisions of the Fair Employment and Housing Act (Govt. Code, § 12900 et seq.) and any applicable regulations promulgated there under (Cal. Code of Regs., tit. 2, § 72850.0 et seq.). Vendor agrees to include the non-discrimination and compliance provisions of this clause in any and all subcontracts to perform work under the agreement.

I. Assignment/Subcontracting

1. **Assignment.** The Vendor will not assign or transfer its interest, in whole or in part, under this agreement, without the written consent of the State Bar, which consent may be granted or withheld in the sole and absolute discretion of the State Bar.
2. **Subcontracting.** The Vendor may subcontract with other qualified firms or individuals as required to complete all, or a portion of, the delivery of equipment and services, with the prior written approval of the State Bar.

The Vendor will clearly describe the reason for using any subcontractors, the specific role each subcontractor will play in the project, and the relationship between the Vendor and its subcontractor to be maintained during the term of this agreement. No subcontract will be approved unless the Vendor provides a written guarantee that the Vendor's firm will be contractually obligated to assume all project responsibilities and the insurance requirements set forth above.

J. General Provisions

1. **Force Majeure.** Neither party will be deemed in default of this agreement or any provision hereunder to the extent that any delay or failure in the performance of the obligations of such party (other than the payment of money) results from any significant and material causes beyond its reasonable control and without fault or negligence by such party. Examples of such causes include, but are not limited to, (1) acts of God or public enemy, (2) acts of the government in either its sovereign or contractual capacity, (3) fires, (4) floods, (5) epidemics, (6) quarantine restrictions, (7) strikes, (8) embargoes, (9) earthquakes, and (10) unusually severe weather.
2. **Governing Law.** The agreement will be governed by the laws of the State of California without giving effect to its principles of conflict of laws.
3. **Attorneys' Fees.** In the event either party institutes any action or proceeding against the other party relating to this agreement, the unsuccessful party in such action or proceeding will reimburse the successful party for its disbursements incurred in connection therewith and for its reasonable attorneys' fees as fixed by the court. In addition to the

foregoing award of attorneys' fees to the successful party, the successful party in any lawsuit shall be entitled to collect or enforce the judgment. This provision is separate and several and shall survive the merger of the agreement into any judgment.

4. **Audit.** Vendor agrees that the State Bar or its designee shall have the right to review and copy any records and supporting documentation pertaining to the performance of this Agreement. Vendor agrees to maintain such records for possible audit for a minimum of three (3) years after final payment, unless a longer period of records retention is stipulated. Vendor agrees to allow the State Bar or its designee access to such records during normal business hours and to allow interviews of any employees who might reasonably have information related to such records. Further, Vendor agrees to include a similar right of the State Bar or its designee to audit records and interview staff in any subcontract related to performance of this Agreement.
5. **License.** In those instances where required, the Vendor represents and warrants that the Vendor holds a license, permit or special license to perform the services pursuant to this agreement, as required by law, or employs or works under the general supervision of the holder of such license, permit or special license and shall keep and maintain all such licenses, permits or special licenses in good standing and in full force and effect at all times while the Vendor is performing the services pursuant to the agreement.